



# Referral Source Link – Setup Manual

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**– CONFIDENTIAL –**

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## SETUP INSTRUCTIONS – REFERRAL SOURCE LINK ONLINE

Referral Source Link has been engineered to offer an integrated set of services through both the mobile application and through Referral Source Link Online, which is a component of the HCHB system in Homecare Connections.

Before Referral Source Link can be used, certain setup operations have to be completed within the Referral Source Link Online system – generally table maintenance to identify people who will use the system, names of sales teams, security privileges and such things as call types, purposes, deliverables, allowable expense types and other basics. In the Online system, Admission Coordinators (ACs) are assigned to referral sources (physician offices and facilities), and certain CRM (customer relationship management) information may be entered about referral sources and the people who work in them. The online system also contains a set of reports, limited by the user's security level in the system, which may be accessed by anyone from an AC to a sales executive.

## ESTABLISHING THE BASIC ENVIRONMENT

In Referral Source Link, ACs are assigned to facilities or physicians' offices. ACs are also assigned to sales teams, and these teams can be named as appropriate for the agency.

There are two basic classes of users in Referral Source Link online – "ACs" and "Supervisors." The latter refers to sales/marketing supervisors, directors, VPs or anyone else with sales team members reporting to them. The scope of supervision, which governs whose call a user can see and who the user can select to see on reports, is controlled by teams which are assigned to that user. So, an AC is assigned to a team, one or more teams are assigned to the supervisor, and so on. A supervisor may see any number of teams, up to and including all teams in the agency.

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## CREATING A WORKER

To create a new worker, you must log into R2 and select Add/Edit worker. R2 → Resource Manager → Worker Console → Add/Edit Workers. Once you select or add a worker, R2 produces the following window:

### DEMOGRAPHICS

\*All fields with an asterisk are required.

The screenshot displays the 'Add Worker' form in the R2 system. The form is titled 'Add Worker' and has a sidebar on the left with various tabs: Demographics, Organization Assignments, Qualifications, Permissions, Payroll Information, Login Profiles, Renewable Requirements, Licenses, HR Log, Counseling Events, Field Inventory, Attachments, and HCHB Licensing. The 'Demographics' tab is currently selected. The form contains the following fields:

- Last Name \* (GARCIA)
- First Name \* (MATT)
- Middle Initial ( )
- Status \* (ACTIVE)
- Nickname ( )
- Birth Date ( )
- Worker ID (26548)
- NPI ( )
- Race ( )
- Marital Status ( )
- Gender ( )
- Home Branch \* ( )
- Street \* ( )
- ZIP Code \* ( )
- City \* ( )
- State \* ( )
- County ( )
- Home Phone ( )
- Work Phone ( )
- Cell Phone ( )
- Pager ( )
- Email Address ( )
- Signature Title ( )
- Referred By ( )
- Referral Contact Phone ( )
- Referral Category ( )
- Comments ( )
- User Field 1 ( )
- User Field 2 ( )

## PAYROLL TAB

Worker Category and Mileage Payment Method are required entries.

Edit Worker: STERLING, DAVID

Demographics

Organization Assignments

Qualifications

Permissions

**Payroll Information**

Login Profiles

Renewable Requirements

Licenses

HR Log

Counseling Events

Field Inventory

Attachments

HCHB Licensing

Relationships

Availability

Payroll Information

Hire Date  
Termination Date

Driver's License State  
Driver's License No.  
SSN

Payroll Dept  
Payroll No.  
Expected Hours / Week

Worker Classifications

Primary Worker Class  
☐ Office ☒ Field ☐ Sales

Worker Type  
EMPLOYEE

Primary Job Description  
RN

Exempt ☐ Full Time ☐

Contractor

Payroll Shifts

Shift	Payment Method
WEEKLY 3-11	
WEEKLY 7-3	
WEEKLY 11-7	
WEEKEND	
EVENING	
ON CALL M-F	
ON CALL S-S	
PCM	
HOSP PCM 3-11	
HOSP PCM 7-3	
TRC 10 T-F	

Travel

Mileage Pay Method  
ACTUAL MILEAGE

Commute Miles  
0

Effective From	Effective To	Worker Category	Standard Pay Method	Overtime Pay	Holiday Pay Method	Evaluate Pro
01/01/1900		FULL TIME	SALARIED	N		N

+ Add

✎ Edit

🗑 Delete

Legacy Payroll

Create Template

Save & Stay

Save

Don't Save

**PERMISSIONS TAB**

For all users: The “Able to be Admission Coordinator” needs to be set to “Y”

For all Sales Managers: The “Able to Obtain Login Profile” needs to be set to “Y”

The screenshot shows the 'Add Worker' form with the 'Permissions' tab selected. The left sidebar lists various sections: Demographics, Organization Assignments, Qualifications, Permissions, Payroll Information, Login Profiles, Renewable Requirements, Licenses, HR Log, Counseling Events, Field Inventory, Attachments, and HCHB Licensing. The main area displays several permission settings, each with a dropdown menu. A red box highlights the 'Able to Obtain Login Profile' setting, which is currently set to 'Y'. Other visible settings include 'Able to Perform Visits' (N), 'Able to Perform SOC/RECERT Evaluations' (N), 'Able to be Admission Coordinator' (Y), 'Allow Signature on 485/POC' (Y), 'Allow Automatic Approval of this Worker's Orders?' (N), and 'Allow Rapid Reschedule of Visits?' (Y). At the bottom right, there are three buttons: 'Save & Stay', 'Save', and 'Don't Save'.

Section	Permission	Value
Permissions	Able to Perform Visits *	N
	Able to Perform SOC/RECERT Evaluations *	N
	Able to Obtain Login Profile *	Y
	Able to be Admission Coordinator *	Y
	Allow Signature on 485/POC *	Y
	Allow Automatic Approval of this Worker's Orders? *	N
Permissions	Allow Rapid Reschedule of Visits?	Y

## LOGIN PROFILE

Through the Login Profile, the first step is to assign the appropriate system roles to the user. All Referral Source Link users must have the “Admission Coordinator” role. Sales Managers or Supervisors should also be assigned the “Referral Source Link Admin” role.

In order to view the “Sales Supervisor Teams” tab, the user must check the Sales Supervisor box on the top of the screen. This gives the user rights to certain Sales Teams created within the system.

The screenshot shows the 'Edit Login Profile for STERLING, DAVID' window. The 'Profile Name' is 'DEFAULT'. The 'Sales Supervisor' checkbox is checked and highlighted with a red box. The 'System Roles' section on the left includes 'System Functions', 'Responsible Positions', 'Clinical Teams', 'Service Lines', 'Sales Supervisor Teams', and 'AR Groups'. The 'Available System Roles' list includes: HOSPICE CLINICAL COORDINATOR, HOSPICE CLINICAL DIRECTOR, HOSPICE MEDICAL RECORDS, HOSPICE PATIENT CARE MGR, HOSPICE SCHEDULER, HUMAN RESOURCES, INSURANCE SPECIALIST, INTAKE, MEDICAL DIRECTOR, MEDICAL RECORDS SPECIALIST, NPDN ISLAND PC, NURSE CASE MANAGER, OFFICE USER / IDG TEAM MEMBER, ON CALL, PATIENT CARE MANAGER, PAYROLL, POCKET PC POINT PERSON, PRE-IMPLEMENTATION, QI, REPORTS GLOBAL CRITERIA, SCHEDULER, SUPPLY, SYSTEM ADMINISTRATOR, and VOLUNTEER COORDINATOR. The 'Assigned System Roles' list includes: ADMISSION COORDINATOR and REFERRAL SOURCE LINK ADMIN. The bottom of the window has 'Save & Stay', 'Save', and 'Don't Save' buttons.

**\*\*One or more users in an agency should be designated as Referral Source Link Administrators, and these people will have authority to perform Referral Source Link table maintenance, assign supervisory roles within Referral Source Link, etc. Your systems administrator should select Add/Edit Workers, select these individuals, and assign the Referral Source Link Admin role to their login profile as shown above.**

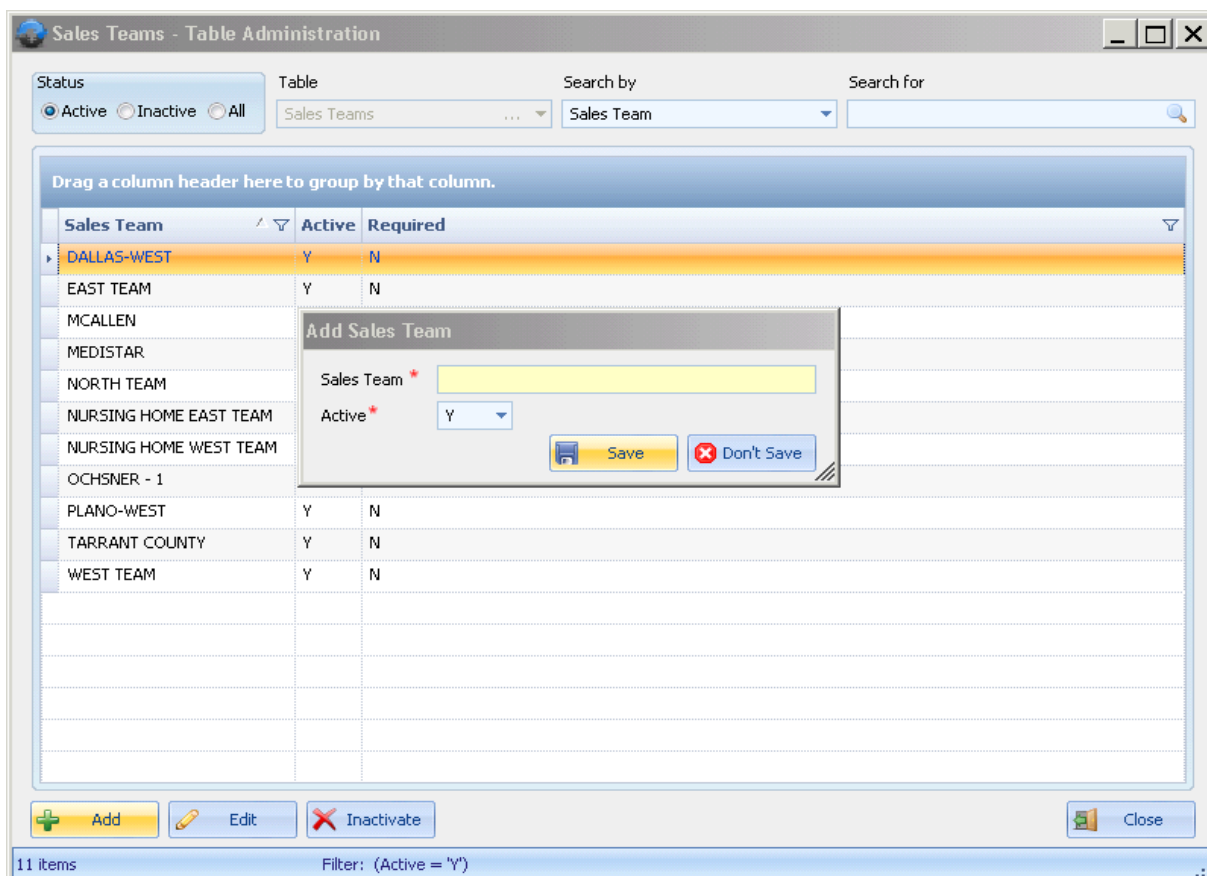


## PORTAL LOGIN CAPABILITIES

You will need to give Customer Support the names of any NEW users who will need to log on to the HCHB Portal (most ACs will be new users; however, a few may have already had access to the portal to support other job duties. Please do not include these people, as to do so would result in duplicate IDs in the portal). HCHB Support will inform you when the new Login IDs have been created, and will tell you what they are. You will need to enter this login ID into the User Administration panel for each potential Referral Source Link user before they will be able to successfully enter the system. The Login ID must be inserted into the Login ID field in the User Maintenance panel. Once IDs have been assigned by Support, ACs are added to the Referral Source Link Online system as follows: **Workers→Edit Workers**. Even though these are field people, they are considered “Office Users” in this case because they will actually be logging in to HCHB.

## CREATING TEAM NAMES

Another building block of Referral Source Link is sales teams. To add/edit names of sales teams, simply select REFERRAL SOURCE LINK from the HCHB main menu, select Lookup Tables, and then Sales Teams. The following screen will appear:



**Sales Teams - Table Administration**

Status: ☒ Active ☐ Inactive ☐ All

Table: Sales Teams

Search by: Sales Team

Search for:

Drag a column header here to group by that column.

Sales Team	Active	Required
DALLAS-WEST	Y	N
EAST TEAM	Y	N
MCALLEN		
MEDISTAR		
NORTH TEAM		
NURSING HOME EAST TEAM		
NURSING HOME WEST TEAM		
OCHSNER - 1		
PLANO-WEST	Y	N
TARRANT COUNTY	Y	N
WEST TEAM	Y	N

**Add Sales Team**

Sales Team \*

Active \* Y

Save Don't Save

+ Add Edit Inactivate Close

11 items Filter: (Active = 'Y')

To add a team, just click Add in the lower left, enter the team name, and click Save. You may also single-click on an existing team name and click edit to change it, or double-click to enter edit mode.

## ASSIGNING TEAMS TO SALES SUPERVISORS

To control which calls, reports and other data a supervisor sees, go to **Resource Manager** → **Manage Workers** → **Login Profiles** → **Edit**. This process will take you to the following screen:

Checking Sales Supervisor activates the Sales Supervisor Teams tab, which appears as follows:

Edit Login Profile for STERLING, DAVID

Profile Name \* DEFAULT ☒ Sales Supervisor

**System Roles**

**System Functions**

**Responsible Positions**

**Clinical Teams**

**Service Lines**

**Sales Supervisor Teams**

**AR Groups**

Search For

Available Sales Supervisor Teams

DALLAS CO. NORTH  
DALLAS CO. SOUTH  
FORTH WORTH  
SOME COUNTY

Assigned Sales Supervisor Teams

DMP  
HCHB

>  
<  
>>  
<<

Save & Stay Save Don't Save

In the example above, the Supervisor already has access to the DMP and HCHB Teams, and clicking ">" with the highlighted team will also give the supervisor access to that team. If the user needs access to all teams you may click on ">>" to move all teams to the right-hand column. The process can be reversed by removing teams from the right-hand column using "<" (to remove one team name) or "<<" (to remove all). Now you have set up this supervisor to see calls and report information for all individuals assigned to the selected teams.

## ADDING AN ADMISSION COORDINATOR

To add an AC go to **Orb → Homecare Connections → Maintain Admissions Coordinators**. A table will appear, as shown.

**Maintain Admission Coordinators**

Status: ☒ Active ☐ Inactive ☐ All

Search By: Admission Coordinator Search For:

**Admission Coordinators <Worker Name> (23)**

- \*\*\*\* <BOONE, ARLESA>
- FT WORTH, 001 <ALBRIGHT, BARBARA>
- LAMPERT-RILEY, KAREN <GUTHRIE, AUDREY>
- MONEY, EDDIE <MONEY, EDDIE>
- RANDALL, MATT <RANDALL, MATT>
- ROBINSON, JOANNE <MARTINEZ JIMENEZ, BETTY>
- ROTHENBERGER, EMILY <QUINN, BERTHA>
- TERRITORY 10, UPTOWN <STRONG, TORI>
- TERRITORY 12, CENTRAL DALLAS <STERLING, DAVID>
- TERRITORY 13, AUSTIN <BATTLE, LAUREL>
- TERRITORY 2, DALLAS <MCIPHERSON, PATRICK>
- TERRITORY 20, FT WORTH <O'DONNELL, CHRIS>
- TERRITORY 20, PLANO <FULLERTON, CARA>
- TERRITORY 24, RICHARDSON <DILLINGHAM, LACY>
- TERRITORY 25, EAST DALLAS <WINCHESTER, DONNA>
- TERRITORY 27, UNIVERSITY PARK <FULLERTON, CARA>
- TERRITORY 3, UPTOWN <LIGHTFOOT, RACHEL>
- TERRITORY 5, DALLAS <ISAAC, THOMAS>
- TERRITORY 56, DALLAS <PATTISON, NEIL>
- TERRITORY 7, NORTH DALLAS <SEHON, AUBREY>
- TERRITORY 8, MIDTOWN <PECENKA, CORINE>
- TERRITORY 9, DFW <SPANGLER, DANIELLE>
- UPTOWN, DALLAS <SPANGLER, DANIELLE>

**All Admission Coordinators**

Drag a column header here to group by that column.

Admission Coordinator	Worker Name	AC Identifier	Street
****	BOONE, ARLESA	0	123 MAIN ST.
FT WORTH, 001	ALBRIGHT, BARBARA	25011	2615 GREENVILLE AVE
LAMPERT-RILEY, KAREN	GUTHRIE, AUDREY	25002	123 MAIN ST.
MONEY, EDDIE	MONEY, EDDIE	25006	6688 N. CENTRAL EXPRESSWAY
RANDALL, MATT	RANDALL, MATT	25014	180 N STETSON AVE
ROBINSON, JOANNE	MARTINEZ JIMENEZ, BETTY	25005	123 MAIN ST.
ROTHENBERGER, EMILY	QUINN, BERTHA	25003	123 MAIN ST.
TERRITORY 10, UPTOWN	STRONG, TORI	25008	1232 MAIN
<b>TERRITORY 12, CENTRAL DALLAS</b>	<b>STERLING, DAVID</b>	<b>25009</b>	<b>6688 N. CENTRAL EXPY</b>
TERRITORY 13, AUSTIN	BATTLE, LAUREL	25017	6688 N CENTRAL EXPRESSWAY
TERRITORY 2, DALLAS	MCIPHERSON, PATRICK	25001	5301 ALPHA ROAD
TERRITORY 20, FT WORTH	O'DONNELL, CHRIS	25019	6688 N CENTRAL EXPY
TERRITORY 20, PLANO	FULLERTON, CARA	25022	123 MAIN ST
TERRITORY 24, RICHARDSON	DILLINGHAM, LACY	25021	6688 N. CENTRAL EXPRESSWAY
TERRITORY 25, EAST DALLAS	WINCHESTER, DONNA	25020	322 GLENROSE CIRCLE
TERRITORY 27, UNIVERSITY PARK	FULLERTON, CARA	25015	123 MAIN ST
TERRITORY 3, UPTOWN	LIGHTFOOT, RACHEL	25018	6688 N CENTRAL EXPY
TERRITORY 5, DALLAS	ISAAC, THOMAS	25016	1010 BOLLIVARD DR DOWNTOWN

Table Administration

Close

Click Add. A new form will appear with Last Name, First Name, Worker, and Active. Because of turnover, we suggest you populate the boxes as territories, instead of names. For Example:

**Last Name:** Territory 12

**First Name:** Central Dallas

**Worker:** David Sterling

(This will help when replacing old AC's with New AC's.)

**\*\*See "Assigning Physician Offices and Facilities to ACs" for information regarding the bottom two fields.**

## ASSIGNING ACS TO SALES TEAMS

Once you have ACs and Sales Teams created, you need to assign ACs to teams. This is done through **Orb** → **Homecare Connections** → **Maintain Admission Coordinators** → click the '+' to expand the appropriate AC record → **Sales Teams**, which yields the following:

**Admission Coordinators - HCHB\_QA**

Status: ☒ Active ☐ Inactive ☐ All

Search By: Admission Coordinator Search For:

**Admission Coordinators <Worker Name> (15)**

- BELL, LINDA <BELL, LINDA>
- NONE ASSIGNED <>
- NORTH, RANDI OSTROFF <STURGIS, BARBARA>
- OCEAN, DOLORES PULASKI <GASSAWAY, BEATRICE>
- OCEAN, JENNIFER HITCHNER <HEINSOHN, DIVNA>
- PA - CENTER CITY, LESLIE BARBUTO <REED, CARL>
- PA - MONT-BUCKS, KAREN WALSER <CAMERON, DME>
- PA - NE PHILLY, DAVE RIORDAN <DELGADO, BRENDA>
- SHORE, KAY HADLEY <PINALES, ANN>
- SNJ - CAMDEN, DON MCMANAMY <CRUTCHFIELD, DO>
- SNJ - GLOUCESTER, ELLIE FERGUSON <MOSES, ANDR>
- SNJ - HOSPICE, LAURIE RIVIELLO <ULLERY, CAROL>
- SNJ, JOHN JACKSON <HODGES, BOBBY>
- TEST, QA <PERRY, KIM>
- Locations (4)
  - Monthly Budgets/Quotas
  - Notes
  - Referral Sources (51)
  - Sales Teams**
- TIDWELL, JENNIE <TIDWELL, JENNIE>

**Admission Coordinator (Worker Name)**

TEST, QA <PERRY, KIM>

**Street** 123 MAIN ST. **City** EGG HARBOR TOWNSHIP **State** NJ **ZIP Code** 8234 **Phone** 5555551212

**Sales Teams**

Drag a column header here to group by that column.

Sales Team
TESTING TEAM

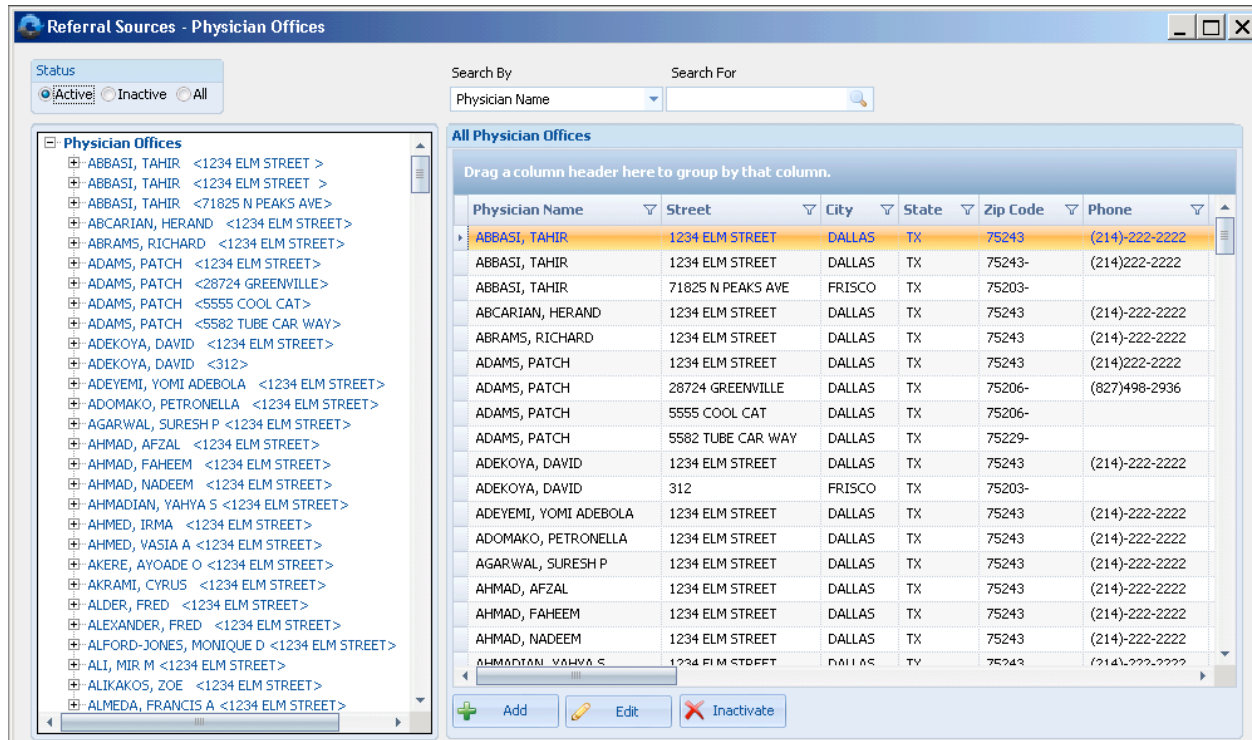
Assign Additional Sales Teams to Admission Coordinator Unassign Sales Teams from Admission Coordinator

Table Administration Close

To add one or more sales teams to the selected AC, click “Assign Additional Sales Team(s) to Admission Coordinator.” Select the team(s) you wish to assign to the AC and click Save to save the changes.

## REFERRAL SOURCES: PHYSICIAN OFFICES AND FACILITIES

To edit Referral Sources in HCHB the user must do the following: Click on **Orb→ Homecare Connections→** choose either **Maintain Physician Office Referrals** or **Maintain Facility Referral Sources**, as follows (this function can only be performed by Sales Supervisors, as identified in the User Administration process):



**Referral Sources - Physician Offices**

Status: ☒ Active ☐ Inactive ☐ All

Search By: Physician Name Search For:

**Physician Offices**

- ABBASI, TAHIR <1234 ELM STREET >
- ABBASI, TAHIR <1234 ELM STREET >
- ABBASI, TAHIR <71825 N PEAKS AVE>
- ABCARIAN, HERAND <1234 ELM STREET>
- ABRAMS, RICHARD <1234 ELM STREET>
- ADAMS, PATCH <1234 ELM STREET>
- ADAMS, PATCH <28724 GREENVILLE>
- ADAMS, PATCH <5555 COOL CAT>
- ADAMS, PATCH <5582 TUBE CAR WAY>
- ADEKOYA, DAVID <1234 ELM STREET>
- ADEKOYA, DAVID <312>
- ADEYEMI, YOMI ADEBOLA <1234 ELM STREET>
- ADOMAKO, PETRONELLA <1234 ELM STREET>
- AGARWAL, SURESH P <1234 ELM STREET>
- AHMAD, AFZAL <1234 ELM STREET>
- AHMAD, FAHEEM <1234 ELM STREET>
- AHMAD, NADEEM <1234 ELM STREET>
- AHMADIAN, YAHYA S <1234 ELM STREET>
- AHMED, IRMA <1234 ELM STREET>
- AHMED, VASIA A <1234 ELM STREET>
- AKERE, AYOADE O <1234 ELM STREET>
- AKRAMI, CYRUS <1234 ELM STREET>
- ALDER, FRED <1234 ELM STREET>
- ALEXANDER, FRED <1234 ELM STREET>
- ALFORD-JONES, MONIQUE D <1234 ELM STREET>
- ALI, MIR M <1234 ELM STREET>
- ALIKAKOS, ZOE <1234 ELM STREET>
- ALMEDA, FRANCIS A <1234 ELM STREET>

**All Physician Offices**

Drag a column header here to group by that column.

Physician Name	Street	City	State	Zip Code	Phone
ABBASI, TAHIR	1234 ELM STREET	DALLAS	TX	75243	(214)-222-2222
ABBASI, TAHIR	1234 ELM STREET	DALLAS	TX	75243-	(214)222-2222
ABBASI, TAHIR	71825 N PEAKS AVE	FRISCO	TX	75203-	
ABCARIAN, HERAND	1234 ELM STREET	DALLAS	TX	75243	(214)-222-2222
ABRAMS, RICHARD	1234 ELM STREET	DALLAS	TX	75243	(214)-222-2222
ADAMS, PATCH	1234 ELM STREET	DALLAS	TX	75243	(214)222-2222
ADAMS, PATCH	28724 GREENVILLE	DALLAS	TX	75206-	(827)498-2936
ADAMS, PATCH	5555 COOL CAT	DALLAS	TX	75206-	
ADAMS, PATCH	5582 TUBE CAR WAY	DALLAS	TX	75229-	
ADEKOYA, DAVID	1234 ELM STREET	DALLAS	TX	75243	(214)-222-2222
ADEKOYA, DAVID	312	FRISCO	TX	75203-	
ADEYEMI, YOMI ADEBOLA	1234 ELM STREET	DALLAS	TX	75243	(214)-222-2222
ADOMAKO, PETRONELLA	1234 ELM STREET	DALLAS	TX	75243	(214)-222-2222
AGARWAL, SURESH P	1234 ELM STREET	DALLAS	TX	75243	(214)-222-2222
AHMAD, AFZAL	1234 ELM STREET	DALLAS	TX	75243	(214)-222-2222
AHMAD, FAHEEM	1234 ELM STREET	DALLAS	TX	75243	(214)-222-2222
AHMAD, NADEEM	1234 ELM STREET	DALLAS	TX	75243	(214)-222-2222
AHMADIAN, YAHYA S	1234 ELM STREET	DALLAS	TX	75243	(214)-222-2222

**Referral Sources - Facilities**

Status: ☒ Active ☐ Inactive ☐ All

Search By: Facility Search For:

**Facilities (306)**

- ST JAMES MANOR
- \*NONE
- A.R. LEAK FUNERAL HOME - CHICAGO
- A.R. LEAK FUNERAL HOME - COUNTRY CLUB HILLS
- ABC PHARMACY
- ACME NURSING HOME
- ADDUS HEALTH CARE
- ADUCCI DUNCAN-ZIMNEY
- ADVOCATE HOME CARE
- ADVOCATE REHAB
- ADVOCATE TRINITY HOSPITAL
- AETNA SPECIALTY SELECT PHARMACY
- ALDEN HEATHER NURSING HOME
- ALDEN ORLAND REHAB AND HLTH SERVICES
- ALEXIAN BROTHERS MEDICAL CENTER
- ALTERNATIVE SERVICES CREMATION CARE CTR
- ANDREW J. CDGANN & SON
- ANGELUS FUNERAL HOME
- APPLEWOOD NURSING AND REHAB CTR
- APPLEWOOD NURSING HOME
- APRIA HME
- APRIA PHARMACY
- BARKER FUNERAL HOME
- BECVAR FUNERAL HOME
- BEVERLY RIDGE FUNERAL HOME
- BLAKE LAMB FUNERAL HOME - CHICAGO
- BLAKE LAMB FUNERAL HOME - OAK LAWN
- BOCKEN FUNERAL HOME

**All Facilities**

Drag a column header here to group by that column.

Facility Name	Street	City	State	Zip	Phc
ST JAMES MANOR	1234 ELM	DALLAS	TX	75343	214
*NONE	1234 ELM	DALLAS	TX	75343	214
A.R. LEAK FUNERAL HOME - CHICAGO	1234 ELM	DALLAS	TX	75343	214
A.R. LEAK FUNERAL HOME - COUNTRY CLUB HILLS	1234 ELM	DALLAS	TX	75343	214
ABC PHARMACY	1234 ELM	DALLAS	TX	75343	214
ACME NURSING HOME	123 MAIN STREET	DALLAS	TX	75206-	(88
ADDUS HEALTH CARE	1234 ELM	DALLAS	TX	75343	214
ADUCCI DUNCAN-ZIMNEY	1234 ELM	DALLAS	TX	75343	214
ADVOCATE HOME CARE	1234 ELM	DALLAS	TX	75204-	214
ADVOCATE REHAB	1234 ELM	DALLAS	TX	75343	214
ADVOCATE TRINITY HOSPITAL	1234 ELM	DALLAS	TX	75343	214
AETNA SPECIALTY SELECT PHARMACY	1234 ELM	DALLAS	TX	75343	214
ALDEN HEATHER NURSING HOME	1234 ELM	DALLAS	TX	75343	214
ALDEN ORLAND REHAB AND HLTH SERVICES	1234 ELM	DALLAS	TX	75343	214
ALEXIAN BROTHERS MEDICAL CENTER	1234 ELM	DALLAS	TX	75343	214
ALTERNATIVE SERVICES CREMATION CARE CTR	1234 ELM	DALLAS	TX	75343	214
ANDREW J. CDGANN & SON	1234 ELM	DALLAS	TX	75343	214
ANGELUS FUNERAL HOME	1234 ELM	DALLAS	TX	75343	214

\*\*When your Facility window populates you will immediately have a populated table for use. When you select your Physician table you will need to load your physicians by first entering search criteria. You can search for a physician/facility with the search box at the top of the window.

## PHYSICIAN OFFICE WINDOW

If you select Physician Offices, you will see the following screen:

**Referral Sources - Physician Offices**

Status: ☒ Active ☐ Inactive ☐ All

Search By: Physician Name Search For:

**Physician Offices**

- ABBASI, TAHIR <1234 ELM STREET >
- ABBASI, TAHIR <1234 ELM STREET >
- ABBASI, TAHIR <71825 N PEAKS AVE>
- ABCARIAN, HERAND <1234 ELM STREET>
- ABRAMS, RICHARD <1234 ELM STREET>
- ADAMS, PATCH <1234 ELM STREET>
- ADAMS, PATCH <28724 GREENVILLE>
- ADAMS, PATCH <5555 COOL CAT>
- ADAMS, PATCH <5582 TUBE CAR WAY>
- ADEKOYA, DAVID <1234 ELM STREET>
- ADEKOYA, DAVID <312>
- ADEYEMI, YOMI ADEBOLA <1234 ELM STREET>
- ADOMAKO, PETRONELLA <1234 ELM STREET>
- AGARWAL, SURESH P <1234 ELM STREET>
- AHMAD, AFZAL <1234 ELM STREET>
- AHMAD, FAHEEM <1234 ELM STREET>
- AHMAD, NADEEM <1234 ELM STREET>
- AHMADIAN, YAHYA S <1234 ELM STREET>
- AHMED, IRMA <1234 ELM STREET>
- AHMED, VASIA A <1234 ELM STREET>
- AKERE, AYOADE O <1234 ELM STREET>
- AKRAMI, CYRUS <1234 ELM STREET>
- ALDER, FRED <1234 ELM STREET>
- ALEXANDER, FRED <1234 ELM STREET>
- ALFORD-JONES, MONIQUE D <1234 ELM STREET>
- ALI, MIR M <1234 ELM STREET>
- ALIKAKOS, ZOE <1234 ELM STREET>
- ALMEDA, FRANCIS A <1234 ELM STREET>

**All Physician Offices**

Drag a column header here to group by that column.

Physician Name	Street	City	State	Zip Code	Phone
ABBASI, TAHIR	1234 ELM STREET	DALLAS	TX	75243	(214)-222-2222
ABBASI, TAHIR	1234 ELM STREET	DALLAS	TX	75243-	(214)222-2222
ABBASI, TAHIR	71825 N PEAKS AVE	FRISCO	TX	75203-	
ABCARIAN, HERAND	1234 ELM STREET	DALLAS	TX	75243	(214)-222-2222
ABRAMS, RICHARD	1234 ELM STREET	DALLAS	TX	75243	(214)-222-2222
ADAMS, PATCH	1234 ELM STREET	DALLAS	TX	75243	(214)222-2222
ADAMS, PATCH	28724 GREENVILLE	DALLAS	TX	75206-	(827)498-2936
ADAMS, PATCH	5555 COOL CAT	DALLAS	TX	75206-	
ADAMS, PATCH	5582 TUBE CAR WAY	DALLAS	TX	75229-	
ADEKOYA, DAVID	1234 ELM STREET	DALLAS	TX	75243	(214)-222-2222
ADEKOYA, DAVID	312	FRISCO	TX	75203-	
ADEYEMI, YOMI ADEBOLA	1234 ELM STREET	DALLAS	TX	75243	(214)-222-2222
ADOMAKO, PETRONELLA	1234 ELM STREET	DALLAS	TX	75243	(214)-222-2222
AGARWAL, SURESH P	1234 ELM STREET	DALLAS	TX	75243	(214)-222-2222
AHMAD, AFZAL	1234 ELM STREET	DALLAS	TX	75243	(214)-222-2222
AHMAD, FAHEEM	1234 ELM STREET	DALLAS	TX	75243	(214)-222-2222
AHMAD, NADEEM	1234 ELM STREET	DALLAS	TX	75243	(214)-222-2222
AHMADIAN, YAHYA S	1234 ELM STREET	DALLAS	TX	75243	(214)-222-2222

This screen is divided into 2 panes: Physician Offices tree view (left pane) and a pane on the right that shows information about the item selected on the left. When Physician Offices is selected on the left, you may Add, Edit, or Inactivate records in the pane on the right. This is consistent with the Facility screen.



Referral Sources - Physician Offices

Status  
☒ Active ☐ Inactive ☐ All

Physician Offices

- ABBASI, TAHIR <1234 ELM
- ABBASI, TAHIR <1234 ELM
- ABBASI, TAHIR <71825 N F
- ABCARIAN, HERAND <1234
- ABRAMS, RICHARD <1234
- ADAMS, PATCH <1234 ELM
- ADAMS, PATCH <28724 GR
- ADAMS, PATCH <5555 COC
- ADAMS, PATCH <5582 TUB
- ADEKOYA, DAVID <1234 EL
- ADEKOYA, DAVID <312>
- ADEYEMI, YOMI ADEBOLA
- ADOMAKO, PETRONELLA <
- AGARWAL, SURESH P <1234
- AHMAD, AFZAL <1234 ELM
- AHMAD, FAHEEM <1234 EL
- AHMAD, NADEEM <1234 EL
- AHMADIAN, YAHYA S <1234
- AHMED, IRMA <1234 ELM S
- AHMED, VASIA A <1234 ELM
- AKERE, AYOADE O <1234 EL
- AKRAMI, CYRUS <1234 ELM
- ALDER, FRED <1234 ELM S
- ALEXANDER, FRED <1234 E
- ALFORD-JONES, MONIQUE
- ALI, MIR M <1234 ELM STRE
- ALIKAKOS, ZOE <1234 ELM
- ALMEDA, FRANCIS A <1234

Edit Physician Office - 1234 ELM STREET

Physician Name  
 AGARWAL, SURESH P

Street  
 1234 ELM STREET

ZIP Code \* City \* State \* Phone Fax  
 75243- DALLAS TX (214)222-2222 (214)222-2299

Notify New Orders Via \* Notify Vital Sign Alerts Via \*  
 PAPER ☐ Phone ☐ Fax ☒ Email ☐ Web

Physician Group \*  
 \*NONE

Allow Web Access for Visit Notes \*  
 N

Active \*  
 Y

Admission Coordinator \* Service Line \*  
 GARCIA, MATTHEW HOME HEALTH

Admission Coordinator \* Service Line \*  
 GARCIA, MATTHEW HOSPICE

Admission Coordinator \* Service Line \*

Save Don't Save

Code	Phone
13	(214)-222-2222
13-	(214)222-2222
03-	
13	(214)-222-2222
13	(214)-222-2222
13	(214)-222-2222
06-	(827)498-2936
06-	
29-	
13	(214)-222-2222
03-	
13	(214)-222-2222
13	(214)-222-2222
13	(214)222-2222
13	(214)-222-2222
13	(214)-222-2222
13	(214)-222-2222
13	(214)-222-2222

In the right pane, highlight the particular physician you are looking for and click the Edit button. Within the edit box you will be able to edit Street Address, City, State, new order settings, vital sign alerts, and ACs. You may assign an Admission Coordinator to this office by selecting the desired AC from the dropdown list under Admission Coordinator. You may select ONE Admission Coordinator per Service line.

**Referral Sources - Facilities**

Status: ☒ Active ☐ Inactive ☐ All

Search By: Facility Search For:

**Facilities (306)**

- ST JAMES MANOR
- \*NONE
- A.R. LEAK FUNERAL HOME - CHICAGO
- A.R. LEAK FUNERAL HOME - COUNTRY CLUB HILLS
- ABC PHARMACY
- ACME NURSING HOME
- ADDUS HEALTH CARE
- ADUCCI DUNCAN-ZIMNEY
- ADVOCATE HOME CARE
- ADVOCATE REHAB
- ADVOCATE TRINITY HOSPITAL
- AETNA SPECIALTY SELECT PHARMACY
- ALDEN HEATHER NURSING HOME
- ALDEN ORLAND REHAB AND HLTH SERVICES
- ALEXIAN BROTHERS MEDICAL CENTER
- ALTERNATIVE SERVICES CREMATION CARE CTR
- ANDREW J. CDGANN & SON
- ANGELUS FUNERAL HOME
- APPLEWOOD NURSING AND REHAB CTR
- APPLEWOOD NURSING HOME
- APRIA HME
- APRIA PHARMACY
- BARKER FUNERAL HOME
- BECVAR FUNERAL HOME
- BEVERLY RIDGE FUNERAL HOME
- BLAKE LAMB FUNERAL HOME - CHICAGO
- BLAKE LAMB FUNERAL HOME - OAK LAWN
- BOCKEN FUNERAL HOME

**All Facilities**

Drag a column header here to group by that column.

Facility Name	Street	City	State	Zip	Phc
ST JAMES MANOR	1234 ELM	DALLAS	TX	75343	214
*NONE	1234 ELM	DALLAS	TX	75343	214
A.R. LEAK FUNERAL HOME - CHICAGO	1234 ELM	DALLAS	TX	75343	214
A.R. LEAK FUNERAL HOME - COUNTRY CLUB HILLS	1234 ELM	DALLAS	TX	75343	214
ABC PHARMACY	1234 ELM	DALLAS	TX	75343	214
ACME NURSING HOME	123 MAIN STREET	DALLAS	TX	75206-	(88
ADDUS HEALTH CARE	1234 ELM	DALLAS	TX	75343	214
ADUCCI DUNCAN-ZIMNEY	1234 ELM	DALLAS	TX	75343	214
ADVOCATE HOME CARE	1234 ELM	DALLAS	TX	75204-	214
ADVOCATE REHAB	1234 ELM	DALLAS	TX	75343	214
ADVOCATE TRINITY HOSPITAL	1234 ELM	DALLAS	TX	75343	214
AETNA SPECIALTY SELECT PHARMACY	1234 ELM	DALLAS	TX	75343	214
ALDEN HEATHER NURSING HOME	1234 ELM	DALLAS	TX	75343	214
ALDEN ORLAND REHAB AND HLTH SERVICES	1234 ELM	DALLAS	TX	75343	214
ALEXIAN BROTHERS MEDICAL CENTER	1234 ELM	DALLAS	TX	75343	214
ALTERNATIVE SERVICES CREMATION CARE CTR	1234 ELM	DALLAS	TX	75343	214
ANDREW J. CDGANN & SON	1234 ELM	DALLAS	TX	75343	214
ANGELUS FUNERAL HOME	1234 ELM	DALLAS	TX	75343	214

As mentioned previously, the screen is divided into 2 panes: Facility tree view and a pane on the right that shows information about the item selected on the left. When Facilities is selected in the pane on the left, you may Add, Edit, or Inactivate records in the pane on the right.



## ASSIGNING ADMISSION COORDINATORS TO PHYSICIANS

Physicians must be assigned to Admission Coordinators in order for them to appear in Referral Source Link on the Android device. Once assigned, Admissions Coordinators have the ability to schedule calls with Physicians assigned to them.

**Edit Physician Office - 5582 TUBE CAR WAY**

**Physician Name**  
ADAMS, PATCH

**Street \***  
5582 TUBE CAR WAY

**ZIP Code \*** 75229-\_\_\_\_ **City \*** DALLAS **State \*** TX **Phone** ( ) - - **Fax** ( ) - -

**Notify New Orders Via \*** WEBSITE **Notify Vital Sign Alerts Via \*** ☒ Phone ☒ Fax ☒ Email ☒ Web

**Physician Group \*** \*NONE

**Allow Web Access for Visit Notes \*** Y

**Active \*** Y

**Admission Coordinator \*** GARCIA, MATTHEW **Service Line \*** HOME HEALTH

**Admission Coordinator** **Service Line**

**Admission Coordinator** **Service Line**

**Save** **Don't Save**

## ASSIGNING ADMISSION COORDINATOR TO FACILITIES AND OFFICES

Like assigning Physicians, Facilities must be assigned to Admission Coordinators in order for them to appear in Referral Source Link on the Android device . Once assigned, Admissions Coordinators have the ability to schedule calls with Facilities assigned to them.

**Edit Facility - ADDUS HEALTH CARE**

Facility Name \*  
ADDUS HEALTH CARE

Active \*  
Y

Street \*  
1234 ELM

ZIP Code \* City \* State \*  
75343-\_\_\_\_ DALLAS TX

Phone Fax  
(214) 000-6700 ( ) - -

Referring Facility Type \* Parent Company \*  
OTHER NONE

Admission Coordinator \* Service Line \*  
SHIPP, SARAH HOME HEALTH

Admission Coordinator Service Line  
JENKINS, ANNA HOSPICE

Admission Coordinator Service Line  
Service Line

Comments

Save Don't Save

## EDIT PHYSICIAN OFFICE CUSTOMER RELATIONSHIP MANAGEMENT INFO

Referral Source Link has the ability to store Customer Relationship Management information about a referral source, for use in managing sales efforts for that source. In the tree view, expand the desired physician office by clicking on the “+” next to the physician office. Highlight “CRM Information” in the tree view and then move click “Edit Physician Office CRM Info” in the right pane.

**Referral Sources - Physician Offices**

Status: ☒ Active ☐ Inactive ☐ All

Search By: Search For:

**Physician Offices**

- ABBASI, TAHIR <1234 ELM STREET>
- ABBASI, TAHIR <1234 ELM STREET>
- ABBASI, TAHIR <71825 N PEAKS AVE>
- ABCARIAN, HERAND <1234 ELM STREET>
- ABRAMS, RICHARD <1234 ELM STREET>
- ADAMS, PATCH <1234 ELM STREET>
- ADAMS, PATCH <28724 GREENVILLE>
- ADAMS, PATCH <5555 COOL CAT>
- ADAMS, PATCH <5582 TUBE CAR WAY>
- Branches (1)
- Contacts (5)
- Admission Coordinators (1)
- Sales Programs
  - CRM Information**
- ADEKOYA, DAVID <1234 ELM STREET>
- ADEKOYA, DAVID <312>
- ADEYEMI, YOMI ADEBOLA <1234 ELM STREET>
- ADOMAKO, PETRONELLA <1234 ELM STREET>
- AGARWAL, SURESH P <1234 ELM STREET>
- AHMAD, AFZAL <1234 ELM STREET>
- AHMAD, FAHEEM <1234 ELM STREET>
- AHMAD, NADEEM <1234 ELM STREET>
- AHMADIAN, YAHYA S <1234 ELM STREET>
- AHMED, IRMA <1234 ELM STREET>
- AHMED, VASIA A <1234 ELM STREET>
- AKERE, AYOADE O <1234 ELM STREET>
- AKRAMI, CYRUS <1234 ELM STREET>
- ALDER, FRED <1234 ELM STREET>

**Edit CRM Info for UNASSIGNED LOCATION**

Location: UNASSIGNED LOCATION

Priority Code: U Priority Description: UNASSIGNED

Primary Admitting Hospital:

Secondary Admitting Hospital:

Total Client Population

% of Medicare	% of Medicaid	% of Insurance
0	0	0

Does office currently refer clients to a Home Health Agency? ☐ Yes ☒ No

If yes, which one?

Why was this Agency selected?

Save Don't Save

**Edit Physician Office CRM Info**

## EDIT FACILITY CUSTOMER RELATIONSHIP MANAGEMENT INFO

Clicking the “Edit Facility CRM Info” button as shown below will produce the “Edit CRM Info” form.

The screenshot shows the 'Referral Sources - Facilities' window. On the left, a tree view lists various facilities, with 'CRM Information' highlighted under 'Sales Programs'. A red arrow points to this item. On the right, the details for 'APPLEWOOD NURSING AND REHAB CTR' are displayed. Below the details, the 'View Facility CRM Info' section shows a table of facility types and their associated metrics. At the bottom right, the 'Edit Facility CRM Info' button is circled in red.

Facility Name	Facility Type	Active
APPLEWOOD NURSING AND REHAB CTR	NURSING HOME	Y

Street	City	State	ZIP Code	Phone
1234 ELM	DALLAS	TX	75343	214-000-6700

**View Facility CRM Info**

**Location**  
UNASSIGNED LOCATION

**Priority Code**  
U

**Priority Description**  
UNASSIGNED

	Number of Beds	% Medicare
Independent Living	0	0
Assisted Living	0	0
Skilled Nursing Facility	0	0
Full Service Hospital	0	0
Specialty Hospital	0	0
Adult Day Care Facility	0	0
Other	0	0

**Edit Facility CRM Info**

The screenshot shows the 'Edit CRM Info for UNASSIGNED LOCATION' window. The 'Location' dropdown is set to 'UNASSIGNED LOCATION'. The 'Priority Code' is 'U' and the 'Priority Description' is 'UNASSIGNED'. Below, a table allows editing the 'Number of Beds' and '% Medicare' for various facility types. At the bottom, there are 'Save' and 'Don't Save' buttons.

**Edit CRM Info for UNASSIGNED LOCATION**

**Location**  
UNASSIGNED LOCATION

**Priority Code**  
U

**Priority Description**  
UNASSIGNED

	Number of Beds	% Medicare
Independent Living	0	0
Assisted Living	0	0
Skilled Nursing Facility	0	0
Full Service Hospital	0	0
Specialty Hospital	0	0
Adult Day Care Facility	0	0
Other	0	0

**Save** **Don't Save**

## ADD/EDIT/INACTIVATE CONTACTS

The user can also add/edit/inactivate contacts within a referring source through this same Physician/Facility view, by clicking the “+” next to a referral source and clicking Contacts.

**Referral Sources - Facilities**

Status: ☒ Active ☐ Inactive ☐ All

Search By: Facility Search For:

**Facilities (306)**

- ST JAMES MANOR
- \*NONE
- A.R. LEAK FUNERAL HOME - CHICAGO
- A.R. LEAK FUNERAL HOME - COUNTRY CLUB HILLS
- ABC PHARMACY
- ACME NURSING HOME
- ADDUS HEALTH CARE
- ADUCCI DUNCAN-ZIMNEY
- ADVOCATE HOME CARE
- ADVOCATE REHAB
- ADVOCATE TRINITY HOSPITAL
- AETNA SPECIALTY SELECT PHARMACY
- ALDEN HEATHER NURSING HOME
- ALDEN ORLAND REHAB AND HLTH SERVICES
- Branches (3)**
- Contacts (3)**
- Admission Coordinators (2)**
- Sales Programs**
- CRM Information**
- ALEXIAN BROTHERS MEDICAL CENTER
- ALTERNATIVE SERVICES CREMATION CARE CTR
- ANDREW J. CDGANN & SON
- ANGELUS FUNERAL HOME
- APPLEWOOD NURSING AND REHAB CTR
- APPLEWOOD NURSING HOME
- APRIA HME
- APRIA PHARMACY
- BARKER FUNERAL HOME

**Facility Name**  
ALDEN ORLAND REHAB AND HLTH SERVICES

**Facility Type**  
NURSING HOME

**Active**  
Y

**Street**  
1234 ELM

**City**  
DALLAS

**State**  
TX

**ZIP Code**  
75343

**Phone**  
214-000-6700

**Contacts**


Drag a column header here to group by that column.

Contact Name	Contact Type	Comments	Active
CHRISTINA APPELEGATE	DISCHARGE PLANNER		Y
JOHN KELLER	OFFICE MANAGER		Y
NITA NATHAN	DISCHARGE PLANNER	TEST	Y

Add Edit Inactivate

When choosing to Add or Edit, the form that appears is similar to the one used in Referrals to change contact information, except this one contains only CRM information to be used in the selling process:





 Edit Contact for ALDEN ORLAND REHAB AND HLTH SERVICES

Contact Name *			Contact Type *		
<input type="text" value="JOHN KELLER"/>			<input type="text" value="OFFICE MANAGER"/>		
E-Mail Address			Active *		
<input type="text"/>			<input type="text" value="Y"/>		
Work Phone	Extension	Home Phone	Mobile Phone		
<input type="text" value="(555) 123-1234"/>	<input type="text"/>	<input type="text" value="( ) - -"/>	<input type="text" value="( ) - -"/>		
Office Days/Hours			Best Time		
<input type="text" value="MON-FRI 8-5"/>			<input type="text"/>		
Significant Other			Children		
<input type="text"/>			<input type="text"/>		

---

Favorite Restaurant			Favorite Foods		
<input type="text"/>			<input type="text" value="BURGERS AND PIZZA"/>		
Professional Organizations			Education		
<input type="text"/>			<input type="text"/>		
Hobbies			Birthdate	Anniversary	
<input type="text" value="HUNTING, FISHING, SPORTS"/>			<input type="text" value="01/01/1970"/>	<input type="text" value="01/01/2000"/>	
Other Important Date	Description		Other Important Date (2)	Description	
<input type="text" value="01/01/1900"/>	<input type="text"/>		<input type="text" value="01/01/1900"/>	<input type="text"/>	
Comments					
<input type="text"/>					

 Save  Don't Save

Note: Changing any information about this contact, including contact type, etc., will change the information both in the online system and on the mobile application, at the next synch.

## SALES PROGRAMS

### ADDING SALES PROGRAMS

To add a Sales Program, select **R2 → ORB → Homecare Connections → Maintain Sales Programs**.

**Sales Programs - HCHB\_QA**

Status: ☒ Active ☐ Inactive ☐ All

Search By: Selling Message Search For:

**Sales Programs**

Drag a column header here to group by that column.

Title	Sales Program Description	Comments	Start Date
HEART ASSESS	QUALITY CARE FOR HEART PT.5		11/26/2008
HOME CARE	SERVICES PROVIDED BY HOLY REDEEMER		10/23/2009
HOME CARE AND HOSPICE	SERVICES PROVIDED BY HOLY REDEEMER		10/23/2009
HOSPICE PROGRAM	HOSPICE SERVICES		11/26/2008
LIFE ASSESS	TO PROVIDE SAFETY AND QUALITY OF LIFE		07/01/2008
MEDICATION MANAGEMENT	SERVICE WE PROVIDE		10/23/2009
OTHER	MISC. SERVICES		10/23/2009
PALLIATIVE CARE PROGRAM	PAIN MANAGEMENT FOCUS TO HELP IMPORVE QUALITY OF LIFE		11/26/2008
PROVIDER LINK	PROVIDER LINK PRESENTATION		07/25/2008
TELEMONITORING	INTRODUCE VALUE		08/28/2008

Buttons:

To add a sales program, click on the ADD button in the Sales Program pane on the right. A dialog box will appear where you can fill out the title, description of the program, start and end date, and comments.

Click Save.

To add a selling message to the sales program, click the "+" next to the appropriate sales program to expand it, then click Selling Messages in the left pane.

To add selling materials to the sales program, click the “+” next to the appropriate sales program to expand it, then click Selling Materials in the left pane.



[illegible]

Expand and view more information about the Sales Programs by clicking the “+” next to Sales Programs. This expands the Sales programs to show the corresponding Sales Program Notes and Selling Messages.

Any information entered by the AC during sales calls related to sales programs will display here, including date introduced, date closed, any notes for the sales program and selling messages discussed.

## MONTHLY BUDGETS


Sales Managers have the ability to set Monthly Budgets/Quotas for each Admission Coordinator. These budgets will be reflected in the Knowledge Link Module ONLY.

**Maintain Admission Coordinators**

Status: ☒ Active ☐ Inactive ☐ All

Search By: Admission Coordinator Search For:

**Admission Coordinators <Worker Name> (61)**

- BARRAGAN, MARK <BARRAGAN,MARK>
- BULLOCK, TYLER <BULLOCK,TYLER>
- COWBOY, COUNTRY <BOULLEMET,DONYA>
- DALLAS, WEST <OWENS,TERRELL>
- DALLAS, WEST <HOUSTON,DAWN>
- EAST, SIDE <DIAZ,VERONICA>
- EASTERN, CARROLTON <CLINKENBEARD,TOBY>
- ENGLISH, CORY <ENGLISH,CORY>
- GARCIA, MATTHEW <DANGER,BILLYBOB>
- Locations (2)
- Monthly Budgets/Quotas** 
- Notes
- Referral Sources (8)
- Sales Teams (7)
- GRAHAM, QUETIN <BURNETT,DESI>
- GUILD, RUSSELL <GUILD,RUSSELL>
- HALLER, TAMMY <HALLER,TAMMY>
- HARRIS, SARAH <HARRIS,SARAH>
- HUSTON, HEATH <HUSTON,HEATH>
- J P, ONEIL <ONEIL,JAMES>
- J, P, O' NEIL <LEBOWSKI,JEFFERY>
- JENKINS, ANNA <JENKINS,ANNA>
- JIMMY, JAMES <JOHNSON,JOE>
- JOHNSON, ELLE <JOHNSON,ELLE>
- JORTNER, SUZANNE <JORTNER,SUZANNE>
- LEWIS, JACKIE <LEWIS,JACKIE>
- MIDDLESEX, COUNTY <INGRAM,TIM>
- NONE ASSIGNED <>

**Admission Coordinator (Worker Name)**  
WEST, TEXAS <GARCIA,MATTHEW>

**AC Identifier**  
25054

**Active**

**Street**  
123 MAIN

**City**  
DALLAS

**State**  
TX

**ZIP**  
75206-

**Phone**

**Admission Coordinator Monthly Budgets/Quotas**

Admission Coordinator: WEST, TEXAS (WORKER - GARCIA,MATTHEW) Year: 2010

Note: Admission Coordinator Budgets/Quotas are only used by the Knowledge Link and Referral Source Link Modules

	Jan	Feb	Mar	Apr	May	Jun	Jul
Home Health Medicare Admit Budget	0	0	0	0	0	0	0
Home Health Non-Medicare Admit Budget	0	0	0	0	0	0	0
Hospice Medicare Admit Budget	0	0	0	0	0	0	0
Hospice Non-Medicare Admit Budget	0	0	0	0	0	0	0
Private Duty Admit Budget	0	0	0	0	0	0	0
Home Health Medicare Admit Quota	0	0	0	0	0	0	0
Home Health Non-Medicare Admit Quota	0	0	0	0	0	0	0
Hospice Medicare Admit Quota	0	0	0	0	0	0	0
Hospice Non-Medicare Admit Quota	0	0	0	0	0	0	0
Private Duty Admit Quota	0	0	0	0	0	0	0

Copy January Data to All Months

Save Don't Save

## CALL MANAGEMENT

Almost everything that can be done on the device can be done online in R2, and anything changed in either will affect both as soon as the mobile application is synchronized. Calls can be added/edited in either system, and all information will flow to both.

Calls which can be viewed depend upon the user's role in the system – ACs can only add and edit their own calls, while supervisors can see and edit calls of any AC that is a member of a team assigned to them.

Referral Source Link

Status

☒ Active
 ☐ Inactive
 ☐ All

Search

Search By

Admission Coordinator

Search For

Call Specifics

Call Date from

06/25/2009

Call Status

☒ Open
 ☐ Closed
 ☐ All

Load Referral Source Link

Drag a column header here to group by that column.

Admission Coordinator	Status	Referral Source	Referral Source Name	Date	Type
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	MOHSIN, SYED	1/27/2010 12:00 PM	LUNCHE
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	MOHSIN, SYED	8/18/2009 12:00 PM	EDUCAT
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	MOHSIN, SYED	1/29/2010 9:15 AM	MEETIN
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	CHARROW, JOEL	9/25/2009 8:00 AM	FOLLOW
HIGHLAND, PARK	OPEN	FACILITY	APPLEWOOD NURSING HOME	2/05/2010 8:15 AM	BREAKF
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	BRINK, DALE	2/05/2010 11:30 AM	LUNCHE
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	DREYFUSS, DAVID	1/14/2010 2:00 PM	EDUCAT
HIGHLAND, PARK	OPEN	FACILITY	ST MARGARETS HOSPITAL	1/14/2010 4:00 PM	TELEPH
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	AHMAD, FAHEEM	2/03/2010 8:30 AM	FOLLOW
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	CHANG, MARK	2/03/2010 11:00 AM	MEETIN
HIGHLAND, PARK	OPEN	FACILITY	ST MARGARETS HOSPITAL	2/02/2010 8:00 AM	MEETIN
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	CHANG, MARK	2/02/2010 10:00 AM	FOLLOW
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	DUBOIS, THIERRY	2/01/2010 8:45 AM	BREAKF
HIGHLAND, PARK	OPEN	FACILITY	MORRIS HOSPITAL	2/01/2010 10:00 AM	EDUCAT
HIGHLAND, PARK	OPEN	FACILITY	APPLEWOOD NURSING HOME	4/13/2010 9:30 AM	BREAKF
HIGHLAND, PARK	OPEN	FACILITY	ST MARGARETS HOSPITAL	4/13/2010 12:00 PM	LUNCHE
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	CHANG, MARK	4/13/2010 4:00 PM	EDUCAT
HIGHLAND, PARK	OPEN	FACILITY	CORDT RYAN	4/13/2010 2:00 PM	EDUCAT
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	MAMON, JOHN	4/15/2010 8:00 AM	EDUCAT

Total Records: 229

Add Call

Edit Call

View Call

Inactivate Calls

Status: Active Call Status: Open Call Date From: 06/25/2009

Close



## ADD/EDIT/VIEW CALLS

To add, edit, view, or inactivate a particular call, you first need to locate the call you wish to view or modify.

You have the option to filter call activity by: Status, Admission Coordinator, Referral Source, Referral Source Name, Type, Duration, Mileage, Date, and by Call Status.

**Referral Source Link**

Status  
☒ Active ☐ Inactive ☐ All

Search  
 Search By  
 Admission Coordinator  
 Search For

Call Specifics  
 Call Date from  
 06/25/2009  
 Call Status  
☒ Open ☐ Closed ☐ All  
 Load Referral Source Link

Drag a column header here to group by that column.

Admission Coordinator	Status	Referral Source	Referral Source Name	Date	Type
COWBOY, COUNTRY	OPEN	FACILITY	MERCY HEALTHCARE REHAB CENTER	11/09/2009 12:15 AM	FOLLOW
COWBOY, COUNTRY	OPEN	PHYSICIAN OFFICE	KANDAH, WALID	11/10/2009 8:00 AM	BREAKF
EAST, SIDE	OPEN	PHYSICIAN OFFICE	BRAY, KENNETH	11/05/2009 8:00 AM	BREAKF
EAST, SIDE	OPEN	PHYSICIAN OFFICE	AHMADIAN, YAHYA	11/24/2009 8:00 AM	BREAKF
GARCIA, MATTHEW	OPEN	PHYSICIAN OFFICE	ABRAMS, RICHARD	11/12/2009 8:00 AM	FOLLOW
GARCIA, MATTHEW	OPEN	PHYSICIAN OFFICE	BECK, CHARLES	11/23/2009 11:00 AM	LUNCHE
GUILD, RUSSELL	OPEN	PHYSICIAN OFFICE	IAGMIN, PETER	10/14/2009 11:00 AM	LUNCHE
GUILD, RUSSELL	OPEN	PHYSICIAN OFFICE	IAGMIN, PETER	10/14/2009 11:00 AM	LUNCHE
HIGHLAND, PARK	OPEN	FACILITY	ST MARGARETS HOSPITAL	9/02/2009 1:00 PM	LUNCHE
HIGHLAND, PARK	OPEN	FACILITY	MORRIS HOSPITAL	9/03/2009 9:00 AM	FOLLOW
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	MOHSIN, SYED	1/27/2010 12:00 PM	LUNCHE
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	MOHSIN, SYED	8/18/2009 12:00 PM	EDUCAT
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	MOHSIN, SYED	1/29/2010 9:15 AM	MEETIN
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	CHARROW, JOEL	9/25/2009 8:00 AM	FOLLOW
HIGHLAND, PARK	OPEN	FACILITY	APPLEWOOD NURSING HOME	2/05/2010 8:15 AM	BREAKF
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	BRINK, DALE	2/05/2010 11:30 AM	LUNCHE
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	DREYFUSS, DAVID	1/14/2010 2:00 PM	EDUCAT
HIGHLAND, PARK	OPEN	FACILITY	ST MARGARETS HOSPITAL	1/14/2010 4:00 PM	TELEPH
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	AHMAD, FAHEEM	2/03/2010 8:30 AM	FOLLOW

Total Records: 229

Add Call
 Edit Call
 View Call
 Inactivate Calls

Status: Active Call Status: Open Call Date From: 06/25/2009

Close

To add, edit, view or inactivate a call simply click on the call then click on appropriate button below.

**Referral Source Link**

Status  
☒ Active ☐ Inactive ☐ All





Search  
Search By  
Admission Coordinator  
Search For

Call Specifics  
Call Date from  
06/25/2009  
Call Status  
☒ Open ☐ Closed ☐ All  
Load Referral Source Link

Drag a column header here to group by that column.

Admission Coordinator	Status	Referral Source	Referral Source Name	Date	Type
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	MOHSIN, SYED	1/27/2010 12:00 PM	LUNCHE
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	MOHSIN, SYED	8/18/2009 12:00 PM	EDUCAT
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	MOHSIN, SYED	1/29/2010 9:15 AM	MEETIN
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	CHARROW, JOEL	9/25/2009 8:00 AM	FOLLOW
HIGHLAND, PARK	OPEN	FACILITY	APPLEWOOD NURSING HOME	2/05/2010 8:15 AM	BREAKF
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	BRINK, DALE	2/05/2010 11:30 AM	LUNCHE
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	DREYFUSS, DAVID	1/14/2010 2:00 PM	EDUCAT
HIGHLAND, PARK	OPEN	FACILITY	ST MARGARETS HOSPITAL	1/14/2010 4:00 PM	TELEPH
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	AHMAD, FAHEEM	2/03/2010 8:30 AM	FOLLOW
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	CHANG, MARK	2/03/2010 11:00 AM	MEETIN
HIGHLAND, PARK	OPEN	FACILITY	ST MARGARETS HOSPITAL	2/02/2010 8:00 AM	MEETIN
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	CHANG, MARK	2/02/2010 10:00 AM	FOLLOW
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	DUBOIS, THIERRY	2/01/2010 8:45 AM	BREAKF
HIGHLAND, PARK	OPEN	FACILITY	MORRIS HOSPITAL	2/01/2010 10:00 AM	EDUCAT
HIGHLAND, PARK	OPEN	FACILITY	APPLEWOOD NURSING HOME	4/13/2010 9:30 AM	BREAKF
HIGHLAND, PARK	OPEN	FACILITY	ST MARGARETS HOSPITAL	4/13/2010 12:00 PM	LUNCHE
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	CHANG, MARK	4/13/2010 4:00 PM	EDUCAT
HIGHLAND, PARK	OPEN	FACILITY	CORDT RYAN	4/13/2010 2:00 PM	EDUCAT
HIGHLAND, PARK	OPEN	PHYSICIAN OFFICE	MAMON, JOHN	4/15/2010 8:00 AM	EDUCAT

Total Records: 229

 Add Call  Edit Call  View Call  Inactivate Calls

Status: Active Call Status: Open Call Date From: 06/25/2009

Close

Call entry and editing is self-explanatory, and requires that the user complete information on the tabs shown in the example.

In the Admission Coordinator field, Supervisors have the ability to select ACs from their teams using the dropdown list, while ACs will see only their own name in the list. Certain fields are required, and the system will prompt if these have not been completed when the user attempts to save the call. Calls can be scheduled and entered in advance or after an impromptu call has been made.

The screenshot shows a web application window titled "Add Call". On the left is a sidebar with a vertical list of tabs: "General Call Info" (selected), "Purposes", "Contacts", "Details", "Deliverables", and "Expenses/Mileage". The main area contains the "General Call Info" form with the following fields:

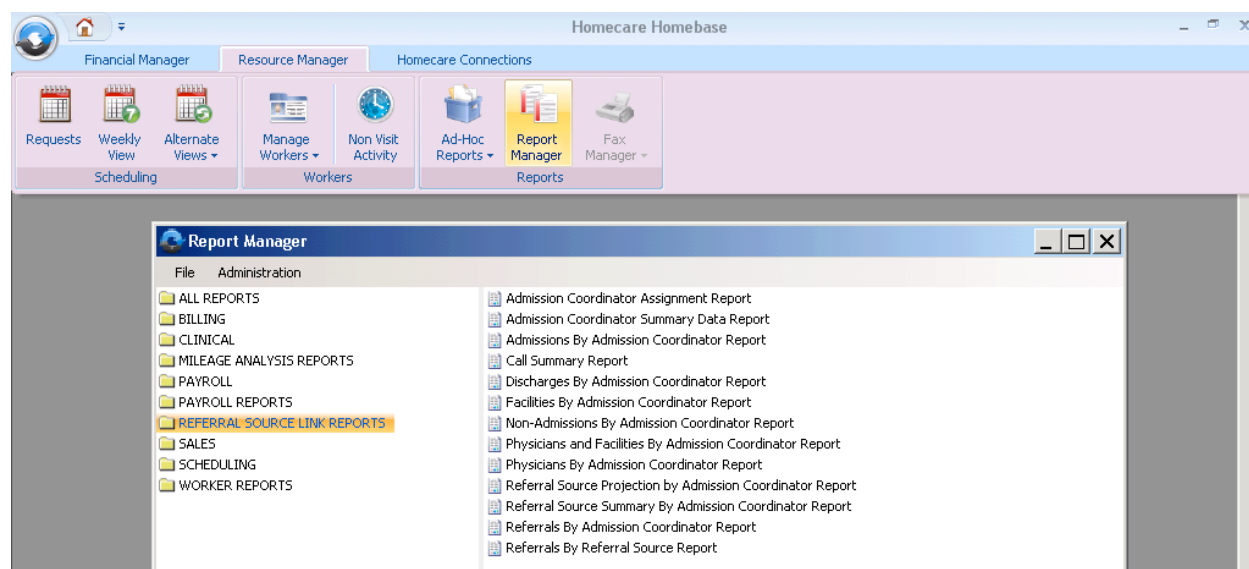
- Admission Coordinator \***: A dropdown menu showing "HIGHLAND, PARK".
- Active \***: A dropdown menu showing "Y".
- Call Date \***: A date picker showing "04/14/2010".
- Call Time \***: A time picker showing "8:00 AM".
- Call Status \***: A dropdown menu showing "OPEN".
- Call Type \***: A dropdown menu that is currently blank.
- Referral Source Type \***: A dropdown menu showing "FACILITY".
- Referral Source Name \***: A text input field that is empty, with a red exclamation mark icon to its right.
- Call Duration (mins)**: A spinner control showing the value "0".

At the bottom of the window are three buttons: "Save & Stay" (with a floppy disk icon), "Save" (with a floppy disk icon), and "Don't Save" (with a red 'X' icon).

## REPORTS

Reports within Referral Source Link are shown as follows:

### Resource Manager > Report Manager > Referral Source Link Reports Folder



Report criteria and output are limited by the user's security level. Supervisors can see all ACs assigned to teams to which they have access, while ACs can see only their own information in these reports.

## SETUP INSTRUCTIONS – ANDROID

### OBTAIN ADMISSION COORDINATOR ID

Using the R2 application, go to the **Orb** → **Homecare Connections** → **Maintain Admissions Coordinators** to see the following:

**Maintain Admission Coordinators**

Status: ☒ Active ☐ Inactive ☐ All

Search By: Admission Coordinator Search For:

**Admission Coordinators <Worker Name> (61)**

- BARRAGAN, MARK <BARRAGAN,MARK>
- BULLOCK, TYLER <BULLOCK, TYLER>
- COWBOY, COUNTRY <BOULLEMET,DONYA>
- DALLAS, WEST <OWENS,TERRELL>
- DALLAS, WEST <HOUSTON,DAWN>
- EAST, SIDE <DIAZ,VERONICA>
- EASTERN, CARROLTON <CLINKENBEARD,TOBY>
- ENGLISH, CORY <ENGLISH,CORY>
- GARCIA, MATTHEW <DANGER,BILLYBOB>
- GRAHAM, QUETIN <BURNETT,DESI>
- GUILD, RUSSELL <GUILD,RUSSELL>
- HALLER, TAMMY <HALLER,TAMMY>
- HARRIS, SARAH <HARRIS,SARAH>
- HUSTON, HEATH <HUSTON,HEATH>
- J P, ONEIL <ONEIL,JAMES>
- J, P, O' NEIL <LEBOWSKI,JEFFERY>
- JENKINS, ANNA <JENKINS,ANNA>
- JIMMY, JAMES <JOHNSON,JOE>
- JOHNSON, ELLE <JOHNSON,ELLE>
- JORTNER, SUZANNE <JORTNER,SUZANNE>
- LEWIS, JACKIE <LEWIS,JACKIE>
- MIDDLESEX, COUNTY <INGRAM,TIM>
- NONE ASSIGNED <>
- PLANO, WEST <BULLOCK,TAREN>
- PRINCE, CYNDI <PRINCE,CYNDI>
- ROSEBERRY, JAKE <ROSEBERRY,JAKE>
- SCRAGGS, LINDSEY <SCRAGGS,LINDSEY>
- SHIPP, SARAH <CHICKS, JR, ANTHONY>

**All Admission Coordinators**

Drag a column header here to group by that column.

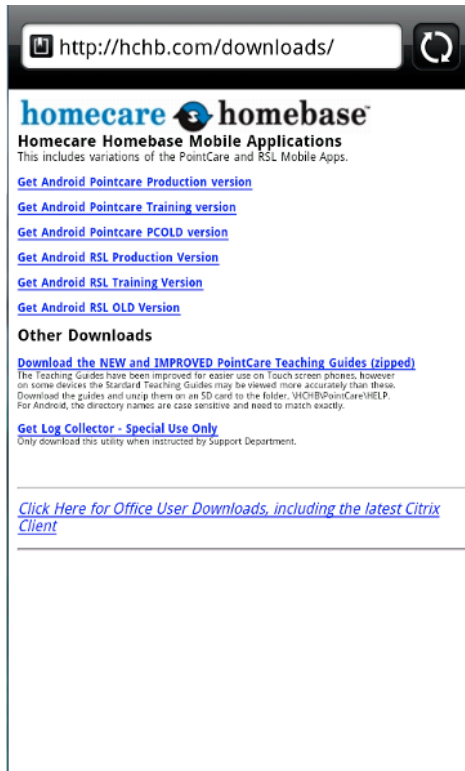
Admission Coordinator	Worker Name	AC Identifier	Street	City
BARRAGAN, MARK	BARRAGAN,MARK	25005	123 HAPPY ST	HIGHLAND PARK
BULLOCK, TYLER	BULLOCK, TYLER	25039		
COWBOY, COUNTRY	BOULLEMET,DONYA	25020	111 MAIN ST.	
DALLAS, WEST	OWENS,TERRELL	25051		
DALLAS, WEST	HOUSTON,DAWN	25055		
EAST, SIDE	DIAZ,VERONICA	25027	~	DALLAS
EASTERN, CARROLTON	CLINKENBEARD,TOBY	25056		
ENGLISH, CORY	ENGLISH,CORY	25028		
GARCIA, MATTHEW	DANGER,BILLYBOB	25036		
GRAHAM, QUETIN	BURNETT,DESI	25019		
GUILD, RUSSELL	GUILD,RUSSELL	25023		
HALLER, TAMMY	HALLER,TAMMY	25047		
HARRIS, SARAH	HARRIS,SARAH	25040		
HUSTON, HEATH	HUSTON,HEATH	25029		
J P, ONEIL	ONEIL,JAMES	25045		
J, P, O' NEIL	LEBOWSKI,JEFFERY	25024		
JENKINS, ANNA	JENKINS,ANNA	25038		
JIMMY, JAMES	JOHNSON,JOE	25058		

+ Add Edit - Inactivate

For each Admissions Coordinator you wish to set up with a device, you will need to note the AC Identifier, which appears immediately to the right of the Worker name in the display. (This will be the number you will need to insert in the user ID section of RSL.)

## DOWNLOADING RSL

1. Using the internet browser, navigate to [www.hchb.com/downloads](http://www.hchb.com/downloads)
2. Choose the appropriate link for the mobile device: “Get Android RSL Production Version”



3. Download and install-see user manual for set up instructions.